

As of October 1, 2016 the Utah State Office of Rehabilitation (USOR) and the Workforce Development Division (WDD) have the ability to share client/customer information between divisions to facilitate the provision of services to clients, coordinate funding, and collaborate on client successful outcomes.

Client information may be shared between divisions when there is a common client/customer and a legitimate business need without a signed release form. \* This includes informal case staffing (typically covered by form 45B) and written documents such as medical or mental health records (usually covered under the PHI form).

When information is requested between divisions, the least personal data will be shared. For example, if a WDD employment counselor requests information about a client's disability, VR will provide the eligibility letter rather than the entire mental or medical health record from the client's file.

When VR receives a request for information from WDD, staff should:

- ❖ Verify that the individual identified is a common client through the data share screen in AWARE.
- ❖ Clarify the business need for the information.
- ❖ Determine the least personal data that meets the stated business need.
- ❖ Staff questions with supervisor, if needed. VR staff is encouraged to consult with supervision if an unusual information request is received or if there is concern about the information to be released. As always, clear communication between divisions will help answer questions and alleviate concerns about information sharing.
- ❖ Share the requested information as appropriate (phone call, email, fax, etc.)
- ❖ Notify the client that information has been shared with the WDD division and why.
- ❖ Document that the information exchange took place and what information was shared. If a letter or email was sent to the client, a copy of this communication in the client record will suffice as documentation.

In order to better inform clients of the interdivision information sharing, VR staff should explain information sharing at key points during the VR process including, but not limited to: during in-person orientations, during the initial interview, when information is requested by WDD, and when VR intends to request information from WDD.

Examples of common WDD Information Requests:

- ❖ To collaborate on an employment plan
- ❖ To collaborate on participation activities if they have physical/mental health issues
- ❖ Need medical evidence for a Family Employment Program (FEP) extension

Examples of common VR Information Requests:

- ❖ Obtain mental health diagnoses or therapy progress from Licensed Clinical Therapists
- ❖ Determine eligibility for programs and funding support
- ❖ Develop the IPE goals in tandem with the WDD employment plan
- ❖ Obtain current wage and employment information
- ❖ Verify comparable benefits (medical, food stamps, child care, other)

\*VR Counselors and WDD staff will still need to obtain an information release (SSA 1696) when requesting information from Disability Determination Services (DDS).